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loan and (originate or origination or process)	184

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DISCLOSURE TEXT:

- This article describes a simple dialogue mechanism that can be used by business professionals (in contrast to programmers) to define business processes. It is assumed that every business process has a primary deliverable (e.g., in a mortgage application business process, the check for the amount of the mortgage). The deliverable represents the output of a (primary) work flow. Secondary deliverables, if needed, are obtained from associated work flows. Note: A "work flow" is a "conversation" between two "roles" (e.g., salesman, order clerk, or manager). For a work flow, a role is specified as one of two types: customer or supplier of the work-flow deliverable. A business process consists of one or more work flows. - The following description assumes the availability of (1) a data base containing objects related to roles, people, deliverables, etc., as well as attributes of such objects, and (2) a browsing facility to support the definition process. - The essential feature of the dialogue is a recursive question- answer sequence for specifying the work flows of a business process. The dialogue presents the following questions, each supported by lists that the process "definer" can browse and select from: o WHAT is the DELIVERABLE? o WHEN must this deliverable be provided? o WHO PROVIDES the deliverable? o WHO is the CUSTOMER for the deliverable? o WHO INITIATES the action (CUSTOMER or SUPPLIER)? The dialogue also asks for the name of the work flow being defined. If the primary work flow is being defined, then the name of the business process itself is the one required. For example, Name of Work Flow = "Mortgage Loan Processing" Once this set of questions has been answered and accepted as valid, the definer must specify a particular customer or supplier as the "initiator" of the work flow. Then for each phase of the work flow the definer must answer the following questions: o Is another role potentially involved in the preparation of the request (or offer)? o Will another role become involved if negotiations occur? (That is, will there be an escalation to a third party?) o Is another role involved in support of the evaluation prior to agreement? o Will another role become involved if, after commitment, the supplier fails to meet the contract? o Is another role involved in the performance of the con- tract? o Is any object used in the work flow supplied by a third party? o Is any work to be delegated to a third party? o If work is so delegated, must agreement with the third party precede agreement between the original parties in the primary work flow? o If a report of completion of the contract is rejected, will a third party become involved? o When determining contract fulfillment, is the customer supported by a third party? A positive response to any of these questions about the current work flow generates another work flow, and the dialogue process is repeated. As work flows are created and developed, the definer can call up a graphic representation that shows the pattern of interaction. A simple table mechanism keeps track of which phases of which work flow remain to be defined. - The question-answer dialogue described here is based on a formal definition of a conversational protocol (*). The dialogue mechanism is

a novel and unique way to analyze the flow of work and the roles of the people involved in a business process. It supports the process definer in determining where functional activities can be aggregated to roles. It also prompts the definer with all of the available alternatives. - Reference (*) Winograd and Flores, Understanding Computers and Cognition, Addison-Wesley, Reading, MA (1986).